



**POV:** THE CASE FOR DYNAMIC CRM  
REGISTRATION FORMS

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# THE CASE FOR DYNAMIC CRM REGISTRATION FORMS

## OVERVIEW

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The design of a customer relationship management (CRM) registration form can have significant impact on program enrollment numbers. Actionable data must be captured, but the customer (whether HCP or consumer) can be unwilling to provide it. The volume of questions, the possibility of receiving spam, or the chance that personal information will not be protected or managed properly can — understandably — be off-putting. An effectively designed CRM registration form should:

- + Be **engaging** — not appear daunting to the customer
- + Capture the data **required** to effectively execute the program
- + Capture data **securely** at the time of registration, writing data directly from the form to the database and encrypting it for storage
- + Provide customers the **option** to opt-in for future communications

This POV examines several registration form designs and demonstrates the value, in particular, of dynamic CRM registration forms, also called “smart” forms.

According to an article in *Modern Marketing Today*, use of dynamic progressive forms (DPFs) has been shown to reduce form abandonment by up to 50 percent.



## CRM REGISTRATION FORM TYPES

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### STATIC REGISTRATION FORM

Across typical pharmaceutical brands, the CRM registration form is a long, static form with numerous questions. The customer likely doesn't know the features and benefits of the program,

how they will receive communications, or how long the program will last. What they do know is that a great deal of personal information is being requested. This type of form design may have abandonment rates as high as 80 percent.<sup>1</sup>

The alternative to the long form is the bare minimum version, in which only the customer name

and email address is captured. With no customer-centric data derived from the registration process, it's difficult to provide relevant content over the course of the program. Intuitively, this type of form should have a higher completion rate because it's short, but Formstack research has shown that short, single-page forms have completion rates up to 50 percent lower than some well-designed forms that span multiple pages.<sup>2</sup>

### DYNAMIC CRM REGISTRATION FORM

A dynamic CRM form uses logic and rules to request information from a registrant. This type of form can easily enable segmentation and provide dynamic registration paths for each segment. For example, a prospect considering a certain medication will have different needs than a patient currently using the medication, so different data will be needed from each. A dynamic form can easily address these different needs. The [ULORIC GoutSmart program registration](#) (below) is a good example of a dynamic CRM form.



As the customer progresses through the registration process, answering a question brings him or her to the next logical question. The registration process occurs in easily digested, bite-size chunks and is less likely than longer forms to overwhelm the customer. According to an article in *Modern Marketing Today*, use of dynamic progressive forms (DPFs) has been shown to reduce form abandonment by up to 50 percent.<sup>3</sup>

## SIGN UP

Register to enroll in *GoutSmart* and get your **ULORIC Savings Card**

### Contact Information

Please note that all information is required unless noted as optional.

First Name:	<input type="text"/>
Last Name:	<input type="text"/>
E-mail:	<input type="text"/>
Re-enter e-mail address:	<input type="text"/>
5-digit ZIP Code:	<input type="text"/>
<small>[This program is open to U.S. residents only.]</small>	
Phone Number:	<input type="text"/>

Because the dynamic registration form can be secure (https: encrypted and hosted by a single party), and data captured is written directly to the database and not shared, it is an effective approach to ensure compliance with federal and state privacy regulations.

A dynamic form eliminates the need for multiple registration forms for different types of customers visiting a website. Having only one form to map to the database means the registration process is streamlined and back-end development is reduced.

### INTERACTIVE, DIALOGUE-BASED REGISTRATION

Some sites built on newer technology platforms, like Adobe CQ5, leverage **interactive dialogue** for registration. In this approach, the site is synonymous with the program, and the design and function is more akin to a mobile app than a website. Registration data is captured contextually in a manner that “disarms” the consumer. According to ConversionXL.com, this type of approach can increase conversions by 25–50 percent.

The conversation might begin, “To get started, first tell me your name.” [Customer inputs name, stored to database.] “At what email address can we contact you?” [Customer inputs email.]

The “guide” leads the consumer through a process of setting up the program, often with a “save” feature so the customer can stop at any point in the process and resume later. This puts the customer in control of how and when they engage, reducing abandonment. If the customer allows them, cookies can be used to identify the customer and create a more personalized



experience. An example of a program with an interactive approach to CRM registration and engagement is the [Fit2Me](#) program from AstraZeneca's diabetes franchise:

**1** My Food

**2** My Activity

**3** My Treatment Support

**4** My Plan Team

**Fit2Me**

Watch the Fit2Me TV commercial

**This time it's all about you.**

Fit2Me is a **free** type 2 diabetes lifestyle plan that's custom-fit to you. It covers 4 key areas of diabetes care—food, activity, treatment information, and support.

**Start Now**  
It's **free** - no obligation

**Click Here to Start**

Fit2Me | My Food | My Activity | My Treatment Support | My Plan Team

## Fit2Me... what's in it for YOU?

Your customized plan is created around the choices that work best for you. For your food plan, you pick the

## RECOMMENDATION

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The dynamic CRM registration form is effective at addressing barriers the static form presents to the customer — particularly in the mobile environment — and makes it easier to streamline data capture by segment and map the data to the database on the back end via a single form.

Of the three approaches to CRM registration discussed above, the dynamic CRM registration form is our recommended approach to maximize program registration through a good customer experience, delivered in a secure manner at a reasonable cost.

## ADDITIONAL CONSIDERATIONS

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When it comes to choosing the best CRM registration approach for your program, there are several additional factors to consider:

- + **Consider where the information exchange occurs.** Does the program live on a website the customer will visit often? If so, progressive profiling can be used to collect only the



information needed to effectively engage the customer over the course of each visit. This approach empowers customers to share information only as needed, typically in response to a value exchange (e.g., to receive a savings card, the customer must provide a mailing address).

- + **Consider social login.** Social login (via Facebook, Twitter, etc.) can be provided as an alternate registration option to the primary form as some consumers prefer it. While social login is commonplace in non-regulated industries, pharma has yet to embrace it. As part of due diligence, companies should ensure this approach is in line with privacy standards.
- + **Test and learn.** While Intouch Solutions generally recommends dynamic registration based on our knowledge and experience, it's not always the right choice for every program. We recommend validation of the approach through A/B testing of different enrollment form designs.
- + **Remember the bigger picture.** Although the design of the registration form is important for maximizing registration conversions, the call-to-action, the program's value proposition and the broader promotional plan also play integral roles in the overall success of the program.

Additional factors, such as the application of behavioral economics principles, can also affect CRM registrations rates. For healthcare marketers and their agencies, it takes experience, careful thought and a test-and-learn mindset to design the optimal form for your specific program.

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<sup>1</sup> Intouch Solutions data on file. 2014.

<sup>2</sup> Formstack 2015 Form Conversion Report.

<sup>3</sup> *Modern Marketing Today*. "Improving Web Form Abandonment with Progressive Thinking." Jan. 14, 2013.

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